Strategic Planning Branch

REPORT

Know Your City

Business Growth In Edmonton, 1990

Research Paper Number 38

April, 1991

The City of Edmonton
PLANNING AND DEVELOPMENT

Research Paper No. 38
Business Growth in Edmonton 1990
by
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Important Note: This technical paper was prepared by the Forecasting and Policy Development Group, Strategic Planning Branch, Planning and Development Department. It documents research results as part of an ongoing forecasting activity. Neither the methods nor the results have been endorsed by the City of Edmonton. For more information, call 428-8846.

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EXECUTIVE SUMMARY

Introduction

The annual report on business growth monitors changes in Edmonton's business structure. Growth areas are identified and different business types examined.

Economic growth depends on new businesses being created and on small businesses starting and expanding. New businesses are important employment generators and can help revitalize declining areas.

Business Growth

Business growth slowed further in 1990 from 1989 figures. During 1990, the number of businesses increased from 18,229 to 18,390, a net growth of 161 businesses (+0.9%). The net growth for 1989 totalled 233 businesses (+1.3%). Retail trade was no longer the fastest growing business type. Business services had the largest increase in businesses in 1990.

Location

New businesses continued to concentrate in industrial areas but growth was in business services and retailing. Downtown lost businesses again but lost fewer than in 1989.

BUSINESS GROWTH IN EDMONTON, 1990

1. INTRODUCTION

▹ The report tracks annual growth of businesses.

Business growth is one of the economic indicators which are monitored regularly by the Forecasting and Policy Development Group. The following report is the latest in a series of annual reports which tracks yearly changes in Edmonton's business structure. The analysis deals with the relative importance of different business sectors and identifies the growth areas and also the areas losing businesses.

The City of Edmonton business assessment data base is the source of information for this analysis. Appendix B discusses the use of the data base.

▹ New businesses must continue to replace businesses lost.

New businesses are vital to sustained economic growth. As new products and technologies develop, loss of businesses is inevitable, but an economy will thrive if new business openings outpace closures. Steady growth occurs when new businesses are replacing older businesses in the same sector or geographic area. However, sudden changes from one sector to another will result in shifts in labour demand.

When business losses concentrate in selected areas of the city while new businesses locate elsewhere, those areas start to experience economic decline. A comprehensive approach is needed to deal with this problem because business losses are only one indicator of decline. New businesses stimulate the local economy by creating employment opportunities and providing additional tax revenues for the city. New job opportunities may then lead to positive net migration. The growing population and greater spending power will improve the market for businesses. Increasing municipal tax revenues provide funds for capital improvements which, in turn, create jobs and may also help businesses operate more effectively. Once an area starts to lose businesses, the effects can multiply. Other businesses close, property becomes vacant, population declines and tax revenues fall. The area then becomes a drain on municipal resources, needing revitalization.

▹ Small businesses create jobs and allow innovation.

Small businesses are important in creating employment. They also provide alternative opportunities during economic downturns and as the economy adjusts to service sector growth. Small businesses may also offer greater flexibility with opportunities for part-time work and continuing work after retirement.

Small businesses can provide an effective means of diversifying the economy. They can be innovative in bringing specialized retail outlets to the public and offering a variety of merchandise. Small business can introduce new products and emerging high technologies.

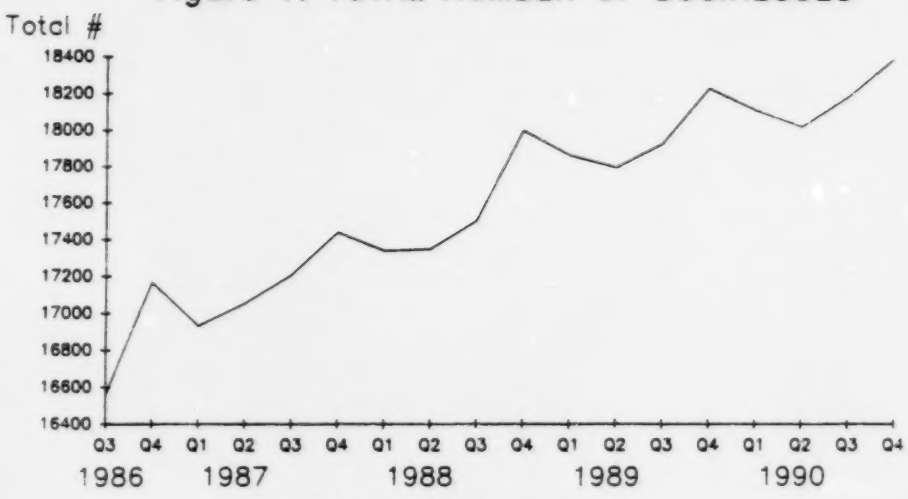
The diversification of Edmonton's economy is dependent on small businesses. As part of the Federal Government's current efforts to reduce costs, both provincial and municipal governments are suffering cuts in grants and programs. Furthermore, the Provincial Government is assisting rural Alberta by moving government offices out of Edmonton. The result of these two measures is that government operations will no longer generate as much economic growth as in the past in Edmonton. New businesses can help to fill the vacuum.

▹ New businesses have a key role in urban change.

The opening of new businesses has an impact on employment, travel patterns and the character and vitality of an area. New businesses are not simply a response to changing circumstances, they are agents of change and the driving force behind revitalization.

The challenge for the City is to work with the business community to create lasting improvements in declining areas, to encourage growth of businesses and promote the city's business opportunities.

Figure 1: TOTAL NUMBER OF BUSINESSES



Source: Finance Department

2. 1990 BUSINESS GROWTH

▹ Slow growth in 1990.

Business growth in 1990 was slow compared with 1989 growth. 1989 was itself a disappointing year with only half the increase in businesses shown in 1988, but figures were even lower for 1990. During 1990, the number of businesses increased from 18,229 to 18,390, a net growth of 161 businesses (0.9%). The net growth for 1989 totalled 233 businesses (1.3%)(Figure 1 and Table 1).

There were 2,768 businesses starts in 1990, a start-up rate of 15.2% and 2,607 businesses were lost (a closure rate of 14.3%). The trend of fewer business openings has continued from 1989 and accounts for the small gain in businesses. The rate of business closure was slightly lower than the 1989 rate.

In 1990, recession hit the Canadian economy. High interest rates had a dampening effect on economic activity. Even higher oil prices at the close of the year failed to stimulate economic growth in Alberta because of the expectation that prices would return to lower levels once the conflict in the Persian Gulf ended. Forecasts are that economic conditions will remain weak into the first half of 1991.[1] Only a modest upturn is foreseen for 1991, with consumers remaining cautious.

The high interest rates, pessimistic forecasts and uncertainty over the impact of the Goods and Services Tax deterred business people from starting new ventures or from expanding existing businesses.

Cuts in government spending have had and will continue to have a negative effect on business growth in Edmonton, a city which is highly dependent on government employment and where work for many individual businesses is generated by government spending.

▹ Business growth maintains its seasonal pattern.

The strongest growth in the number of businesses took place in the fourth quarter of the year. There was a net increase of 207 businesses during this time. During the same period in 1989, the net gain totalled 302 businesses.

The first half of 1990 saw a net loss of 211 businesses, a slightly higher figure than that of 1989. In general, the seasonal pattern was similar to that of 1989, but with smaller gains in the final quarter of 1990 accounting for the lower final total.

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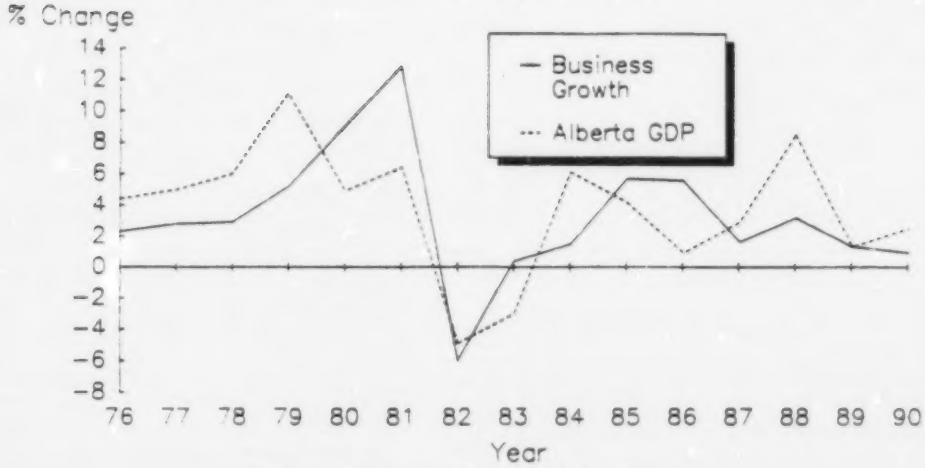
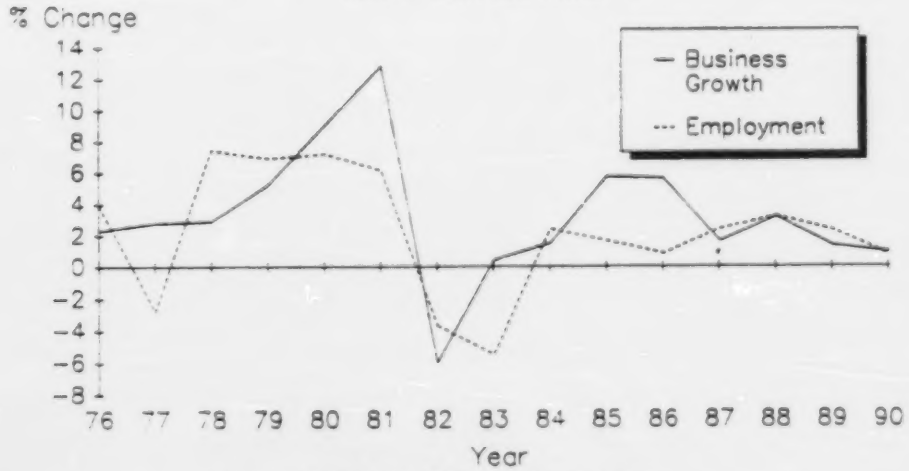
1 *Econoscope, January 1991, Royal Bank of Canada.*

Figure 2: GROWTH IN EDMONTON BUSINESSES AND ALBERTA GDP



Source: Planning and Development Department.
Alberta Bureau of Statistics

Figure 3: GROWTH IN EDMONTON BUSINESSES AND EMPLOYMENT



Source: Planning and Development Department.
Statistics Canada

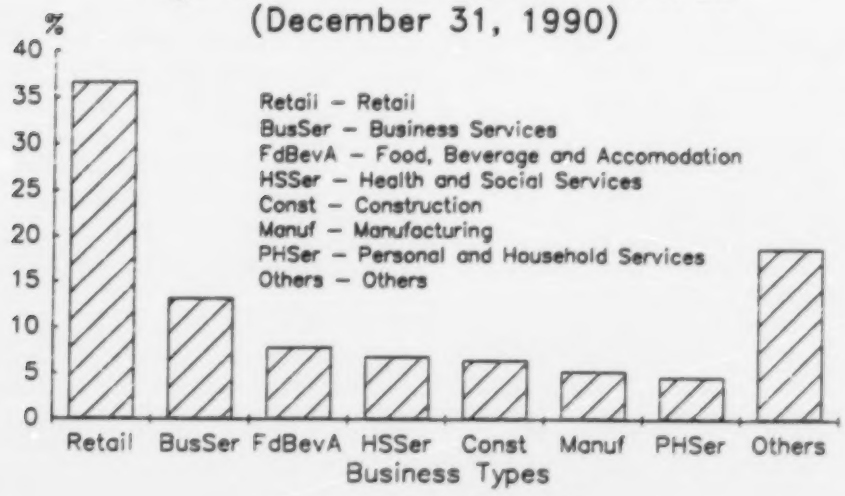
▷ Growth since 1976.

Since the beginning of 1976, the number of businesses in the city has increased by 60.6%, an average of 4% per year. However, the actual annual figures show wide fluctuations in the amounts of growth (Table 1). The peak year was 1981 when the number of businesses increased by 12.8% but this was followed by a loss of businesses in 1982. Since 1982, the highest growth rates were 5.7% and 5.6% in 1985 and 1986. Growth for 1990 is well below average and is also below the rate of population growth during the year (Table 2).

▷ Business growth and the economy.

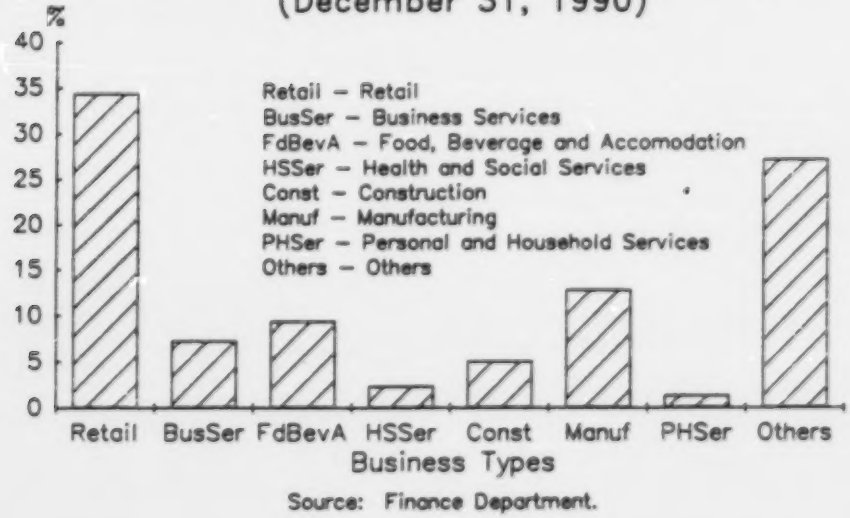
Figures 2 and 3 compare business growth with increases in Alberta gross domestic product (GDP) and with Edmonton employment growth. Edmonton's business growth follows Alberta GDP, with a lag of about one year. Figure 2 indicates that even if significant improvement takes place in the provincial economy, there is a delay of one year before the benefits show in business growth. Employment change is less erratic than business growth because Edmonton's role as a service and government centre has provided stability in employment levels.

Figure 4: MAJOR BUSINESS TYPES
(December 31, 1990)



Source: Finance Department.

Figure 5: FLOORSPACE OF MAJOR BUSINESS TYPES
(December 31, 1990)



Source: Finance Department.

3. COMPONENTS OF BUSINESS CHANGE

▸ In Edmonton, retail businesses dominate.

Retail trade dominates the city's business structure. More than one third of city businesses and assessed floorspace are in retailing (Figures 4 and 5).

The second largest group of businesses is business services, with 13% of total businesses. However, businesses of this type are small in scale and occupy only 7% of assessed floorspace.

Businesses in the food, beverage and accommodation category vary widely from small fast food outlets to major hotels. The percentage of business floorspace occupied by this group is higher than its share of total businesses because hotels are included.

Other important business groups are health and social services, construction and manufacturing.

Lists of numbers of businesses and business floorspace for December 31, 1989 and 1990 appear in Tables 3 and 4. These tables update the information contained in "The City of Edmonton Business Floorspace Inventory".[2]

▸ Retail growth slows in 1990

Retail trade businesses had only a 0.8% growth in total businesses with a net increase of 53 businesses. This low rate of growth continues from 1989, when retail businesses had a net growth rate of 1.2%.

These two years of slow growth follow exceptional growth in 1988 when the number of retail businesses increased by 241 businesses. At this time, new shopping centres opened and the renovation and expansion of older malls was completed. In 1988, 43% of total business growth was in retail trade. Since then retail growth has slackened and is unlikely to recover in the near future as there are indications that retail demand is slowing.

The slow growth in retail businesses is part of the gloomy national picture for retailers. The Globe and Mail (Wednesday, February 13, 1991) reported that retail businesses were seeking rent reductions to allow them to continue operating in shopping malls. The report continued that financial troubles of small- and medium-sized chains had become so acute that as many as 15% of all Canadian stores could close in the first half of 1991, many through bankruptcies

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2 *City of Edmonton Business Floorspace Inventory, Long Range Planning Branch, Planning and Building Department, August 1987.*

and receivership. These problems are attributed to the doubling of retail space across Canada during the past ten years whereas population has increased by only 17%.

▹ Growth in business services.

Business services had the largest increase in businesses in 1990 of all business types. There was a net gain of 55 businesses (a 2.3% increase) compared with a net increase of 53 retail businesses. This is the first time in recent years that another business type has out-paced growth in retailing.

The food, beverage and accommodation group of businesses experienced stronger growth than that of 1989 with an increase of 31 businesses, compared with 19 businesses in 1989. Businesses in this group usually experience high turnover rates (Table 5). Turnover rates for 1990 were more stable than for 1989.

Another group of businesses which showed significant growth during 1990 was health and social service businesses. This group increased by 20 businesses. Real estate and insurance businesses increased by 14 and "other services" had an increase of 10 businesses. Wholesale trade had an increase of 21 businesses in 1989 but no growth in 1990.

The biggest loss in the number of businesses took place among personal and household services, which declined by 19 (net) businesses. There were also losses among the basic industrial groups: mining and oilwell businesses declined by 18 (net) businesses; manufacturing lost 9 (net) businesses and construction businesses declined by 6 businesses. The loss of businesses in these groups has an impact on Edmonton's economic base and its role as a service centre for resource development. Employment losses may have a more adverse impact on workers in these groups as they may have difficulty in moving to other sectors.

▹ Growth since 1986.

Collection of detailed business information began in 1986. Since December 1986, the highest rate of growth (10.5%) has been among the food, beverage and accommodation businesses. Other business types with high growth rates are the smaller groups: communications and utilities and real estate and insurance businesses. Retail trade has experienced a growth of 8.1% since 1986.

In the same period, the most dramatic losses have occurred in the mining and oilwell business group, which has declined by 17.1%. 1990 was a particularly poor year for mining and oilwell businesses in Edmonton.

Recreation and amusement businesses have also been losing ground since 1986, with a loss rate of 13.2%. Finance and insurance businesses continue to decline at a rate of 8.8%.

4. BUSINESS SIZE

▹ Average business size increases.

The average size of Edmonton's businesses has increased since 1986 (Table 6). Retail businesses ended 1990 with the same average floorspace as they had at the end of 1986 (489 square metres), but in the intervening period average retail business size had declined to a low point of 474 square metres in December 1987. The average size of retail businesses increased during 1990, suggesting that the small retail businesses which had generated much of the new business growth in earlier years had been absent in 1990. The increase in average retail floorspace also suggests that closures were concentrated among smaller businesses in 1990.

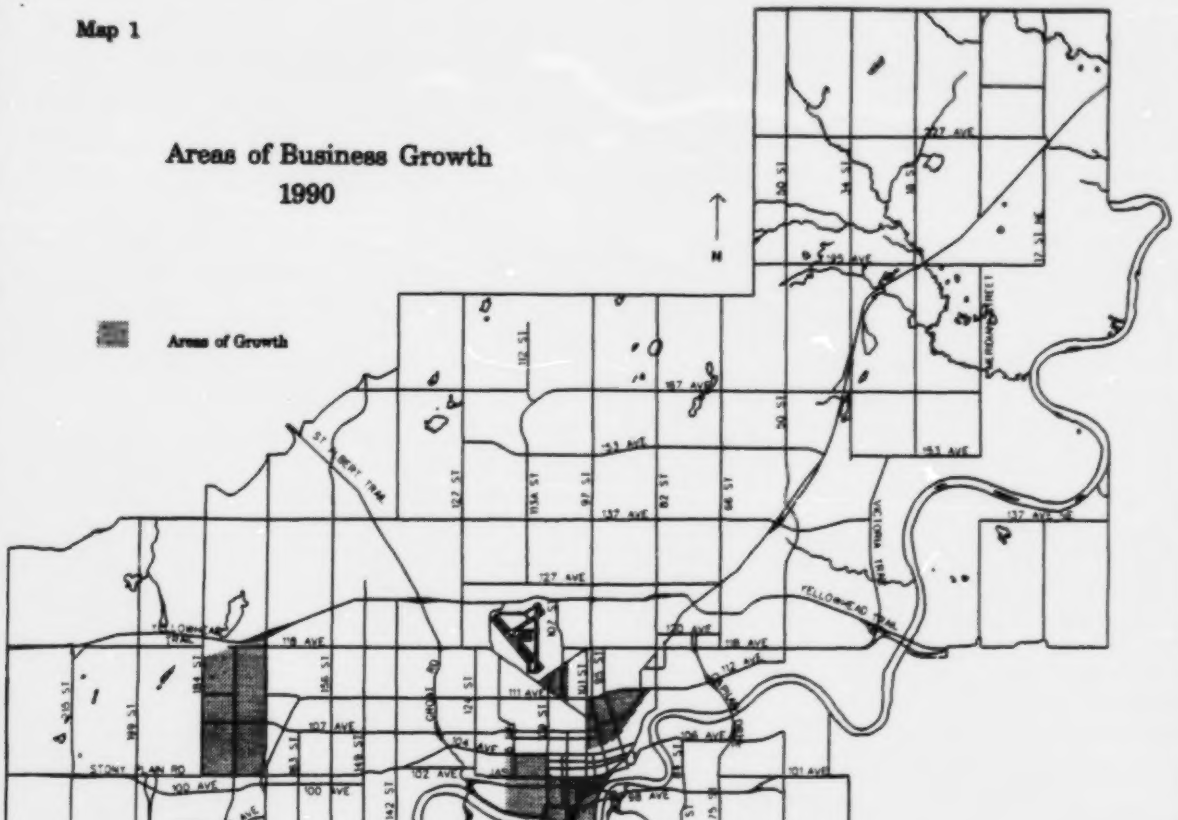
Business services increased in average size since 1986 but these businesses are well below the average business size.

The food, beverage and accommodation business group has an average floorspace greater than the size of most of the businesses within the group because the group includes hotels. The increase in average size of food, beverage and accommodation businesses in 1990, as for retailing, suggests that there has been little increase in small businesses.

Most of the other businesses groups have experienced progressive increases in size since 1986.

Map 1

Areas of Business Growth 1990


Areas of Growth
N
127 AVE
137 AVE
153 AVE
167 AVE
195 AVE
137 AVE NE
ST ALBERT TRAIL
YELLOWHEAD TRAIL
VICTORIA TRAIL
MERIDIAN STREET
120 AVE
118 AVE
112 AVE
111 AVE
107 AVE
106 AVE
104 AVE
102 AVE
101 AVE
100 AVE
98 AVE
97 AVE
90 AVE
87 AVE
82 AVE
63 AVE
45 AVE
23 AVE
18 AVE
9 AVE
9 AVE SW
30 AVE SW
41 AVE SW
STONY PLAIN RD
WHITEMUD DRIVE
TERWILLEGAR DRIVE
CALGARY TRAIL
GROAT RD
215 ST
199 ST
184 ST
170 ST
156 ST
149 ST
142 ST
127 ST
124 ST
120 ST
119 ST
111 ST
109 ST
106 ST
104 ST
103
101 ST
97 ST
91 ST
82 ST
75 ST
66 ST
65 ST
50 ST
34 ST
18 ST
17 ST NE
101 ST SW
111 ST SW
127 ST SW
141 ST SW
91 ST SW
34 ST SW
17 ST SW

5. LOCATION OF BUSINESS GROWTH

▹ New businesses are attracted to industrial areas.

Following the pattern of business growth in 1989, new businesses once again concentrated in industrial areas in 1990 (Map 1).

The Southeast Industrial Area had a net increase of 53 businesses primarily in retailing, business services and construction, with some wholesale and transportation businesses.

The Northwest Industrial Area also had stronger growth in 1990 than 1989, with a net increase of 51 businesses. Growth was especially concentrated in the area to the west of 170 Street and was largely in business services. There was only minimal growth in industrial businesses. For example, manufacturing businesses had a net increase of 5 businesses in the Northwest Industrial Area and the construction sector had a net increase of one business.

▹ Central areas attract business growth.

Although the Downtown (Map 2) itself lost businesses in 1990, surrounding areas experienced some moderate growth in numbers of businesses. The southern part of Downtown, south of Jasper Avenue and east of (and including) 109 Street, had a net increase of 16 businesses. Oliver had a net increase of 14 businesses, primarily in business services and retailing. To the northeast of the Downtown core, extending towards McCauley, there was growth of retail businesses. Retail businesses also generated the growth in and around Kingsway Garden Mall.

The other notable area of growth was along the Calgary Trail.

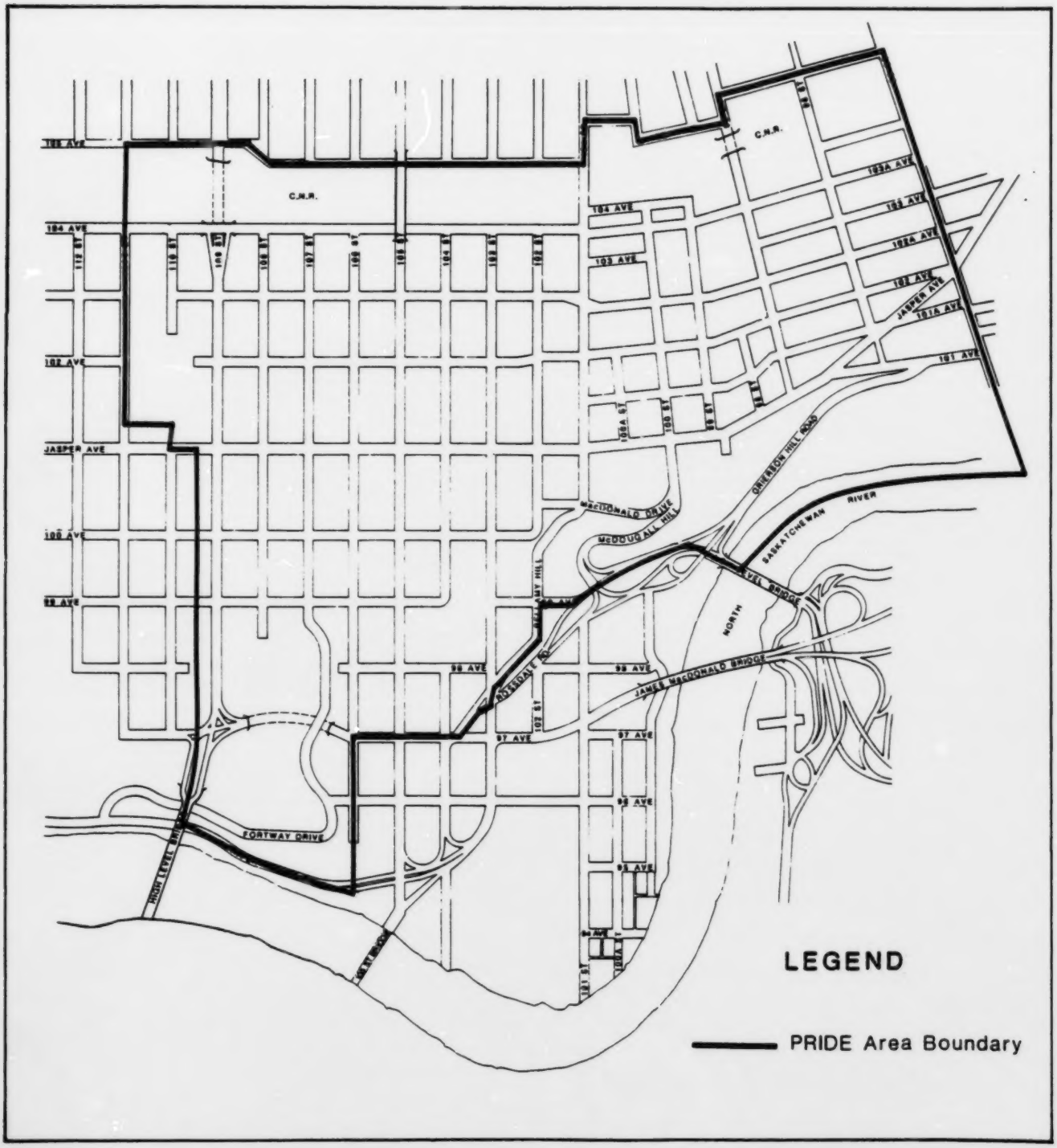
▹ Downtown continues to lose businesses.

After losing 51 businesses in 1989, Downtown continued to lose businesses in 1990, with a net loss of 17 businesses. The biggest losses occurred among retail businesses, as in 1989, and finance and insurance businesses. The central part of Downtown containing the major shopping centres had the heaviest concentration of business losses. Areas on the Downtown periphery remained more stable and made some business gains, especially the area to the south of Jasper Avenue. This follows a period in which business growth became concentrated in the major covered centres at the expense of the peripheral areas and independent businesses.

Although retailing remains the most important business sector in the Downtown (with 27% of the total number of businesses), 1990 saw a small decline in the share of Downtown businesses which are in retail trade. There was a net increase of 9 businesses in business services in 1990. Business services represent 21% of Downtown businesses. The growth in business services is responsible for much of the business growth in the part of Downtown to the south of Jasper Avenue.

Map 2

The Downtown (PRIDE AREA)



▹ Major Commercial Corridors.

The Planning and Development Department has set up a task force to examine development along the major highway entrances to the city. The task force identified four major commercial corridors (Maps in Appendix A) and has produced criteria for guiding development along those corridors.

Development is proceeding at a faster pace along the Calgary Trail than along the other highways, as shown by the following figures on business growth.

Change in the Number of Businesses in Major Commercial Corridors		
	1989	1990
Stony Plain Road/100 Avenue	- 5	- 3
137 Avenue/St. Albert Trail	14	11
Fort Road/Manning Freeway	6	- 3
Calgary Trail	16	21

There was a greater turnover of businesses along Calgary Trail than in the other three areas in 1990. In particular, the Fort Road/Manning Freeway corridor had very little activity.

6. CONCLUSIONS

- The city needs thriving new businesses to maintain economic growth.
- Small businesses play an important role in employment creation.
- Business growth was slow in 1990.
- Retail trade was no longer the fastest growing sector, business services had the highest growth in 1990.
- Downtown continued to lose businesses in 1990, especially in the retail sector.
- The industrial areas were primary locations of growth in businesses, particularly in business services and retailing.

Table 1: Edmonton Business Growth (Historical Data)			
Year	**# Business Premises (at end of year)**	**Increase/Decrease**	**% Change**
1976	11,719	268	2.3
1977	12,050	331	2.8
1978	12,400	350	2.9
1979	13,050	650	5.2
1980	14,227	1,177	9.0
1981	16,044	1,817	12.8
1982	15,085	- 959	-6.0
1983	15,151	66	0.4
1984	15,378	227	1.5
1985	16,249	871	5.7
1986	17,163	914	5.6
1987	17,438	275	1.6
1988	17,996	558	3.2
1989	18,229	233	1.3
1990	18,390	191	0.9

Source: Finance Department

Table 2: Edmonton Businesses Per 1,000 Population			
Year	**Population**	**No. of Businesses (at start of year)**	**Businesses per 1,000 Population**
1976	461,554	11,451	24.8
1977	471,474	11,719	24.9
1978	478,066	12,050	25.2
1979	491,359	12,400	25.2
1980	505,773	13,050	25.8
1981	521,205	14,227	27.3
1982	551,314	16,044	29.1
1983	560,085	15,085	26.9
1984	564,000	15,151	26.9
1985	568,000	15,378	27.1
1986	571,506	16,249	28.4
1987	576,249	17,163	29.8
1988	580,800 (e)	17,438	30.0
1989	583,900	17,996	30.8
1990	605,538	18,390	30.4

Sources: Planning and Development Department
Finance Department
(e) estimate

Table 3: Total Businesses By Type, December 31, 1989					
	Business Type	**Number**	**%**	**Indoor Space (sq.m.)**	**%**
1.	Retail Trade	6,690	36.7	3,217,294	34.2
2.	Business Services	2,375	13.0	685,580	7.3
3.	Food, Beverage and Accommodation	1,413	7.8	874,080	9.3
4.	Health and Social Services	1,242	6.8	214,994	2.3
5.	Construction	1,200	6.6	476,930	5.1
6.	Manufacturing	985	5.4	1,208,321	12.9
7.	Personal and Household Services	889	4.9	133,656	1.4
8.	Wholesale Trade	809	4.4	1,024,866	10.9
9.	Finance and Insurance	469	2.6	230,401	2.5
10.	Other Services	456	2.5	74,039	0.8
11.	Unclassified	423	2.3	257,305	2.7
12.	Transportation and Storage	409	2.2	445,471	4.7
13.	Real Estate and Insurance Agents	265	1.5	71,729	0.8
14.	Mining and Oilwell	217	1.2	166,046	1.8
15.	Recreation and Amusement	146	0.8	147,619	1.6
16.	Communication and Utilities	107	0.6	118,043	1.3
17.	Educational Services	88	0.5	21,267	0.2
18.	Agricultural and Related	46	0.3	33,544	0.4
TOTAL		18,229		9,401,185	

Sources: Finance Department
Planning and Development Department Classification

Table 4: Total Businesses By Type, December 31, 1990					
	Business Type	**Number**	**%**	**Indoor Space (sq.m.)**	**%**
1.	Retail Trade	6,743	36.7	3,298,246	34.4
2.	Business Services	2,430	13.2	703,379	7.3
3.	Food, Beverage and Accommodation	1,444	7.9	904,351	9.4
4.	Health and Social Services	1,262	6.9	229,749	2.4
5.	Construction	1,194	6.5	486,150	5.1
6.	Manufacturing	976	5.3	1,230,268	12.8
7.	Personal and Household Services	870	4.7	131,991	1.4
8.	Wholesale Trade	809	4.4	1,032,593	10.8
9.	Finance and Insurance	469	2.6	220,952	2.3
10.	Other Services	466	2.5	74,720	0.8
11.	Unclassified	442	2.4	261,936	2.7
12.	Transportation and Storage	418	2.3	451,504	4.7
13.	Real Estate and Insurance Agents	279	1.5	76,354	0.8
14.	Mining and Oilwell	199	1.1	168,297	1.8
15.	Recreation and Amusement	145	0.8	146,477	1.5
16.	Communication and Utilities	103	0.6	124,841	1.3
17.	Educational Services	92	0.5	22,016	0.2
18.	Agricultural and Related	49	0.3	30,663	0.3
TOTAL		18,390	100.0	9,594,487	100.0

Sources: Finance Department
Planning and Development Department Classification

Table 5: Rate of Turnover of Businesses, 1990				
Business Type	**No. of New Businesses**	**Creation Rate (%)**	**No. of Retired Businesses**	**Closure Rate (%)**
Retail Trade	1,047	15.7	992	14.8
Business Services	393	16.5	338	14.2
Food, Beverage & Accommodation	297	21.0	266	18.8
Health & Social Services	81	6.5	61	4.9
Construction	166	13.8	173	14.4
Manufacturing	101	10.3	114	11.6
Personal & Household	115	12.9	150	16.9
Wholesale Trade	91	11.2	94	11.6
Finance & Insurance	40	8.5	41	8.7
Other Services	108	23.7	104	22.8
Transportation	64	15.6	54	13.2
Real Estate & Insurance Agents	34	12.8	24	9.1
Mining & Oilwell	15	6.9	34	15.7
Unclassified	148	35.0	95	22.5
Recreation & Amusement	34	23.3	33	22.6
Communication & Utilities	17	15.9	20	18.7
Education Services	13	14.8	10	11.4
Agriculture & Related	4	8.7	4	8.7
TOTAL	2,768		2,607	

Sources: Finance Department
Planning and Development Department Classification

Table 6: Average Business Size Based On Square Metres of Indoor Space					
Business Type	**December 1986**	**December 1987**	**December 1988**	**December 1989**	**December 1990**
All Businesses	513	511	512	516	522
Retail Trade	489	474	476	481	489
Business Services	274	281	288	289	289
Food, Beverage & Accommodation	627	633	620	619	626
Health & Social Services	157	162	170	173	182
Manufacturing	1,191	1,217	1,222	1,227	1,261
Personal & Household Services	133	140	140	150	152
Wholesale Trade	1,224	1,258	1,247	1,267	1,276
Finance & Insurance	440	461	479	491	471

Sources: Finance Department

Appendix A

MAJOR COMMERCIAL CORRIDOR

STONY PLAIN ROAD/100 AVENUE

Appendix II to Schedule 814 of Bylaw 5996 as amended by Bylaw 9292 and subsequent appropriate Bylaws

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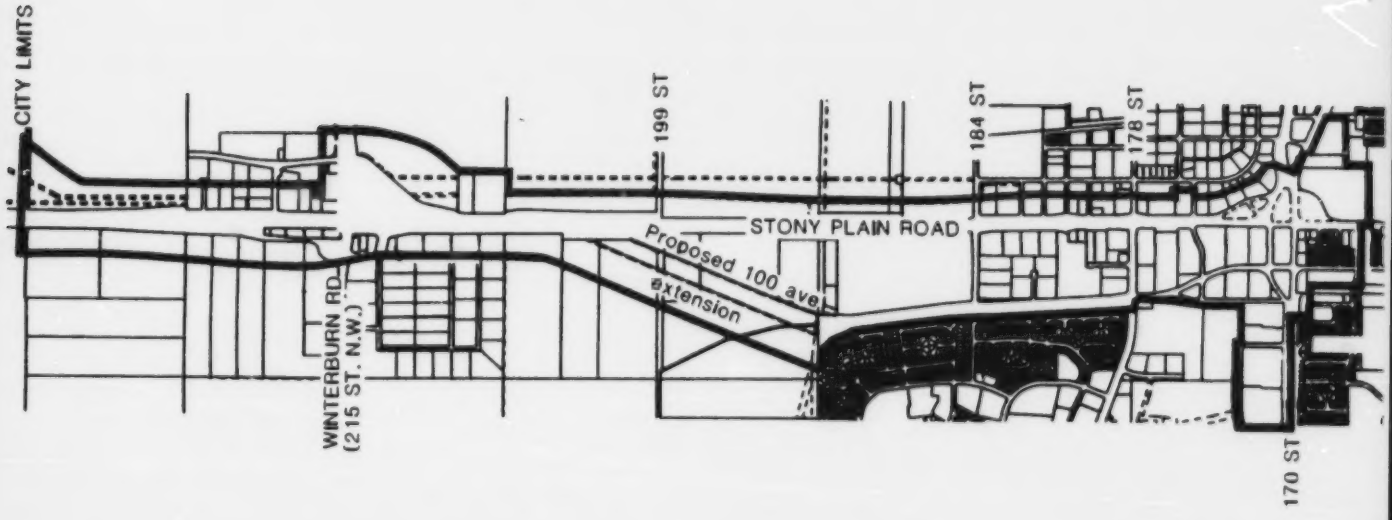


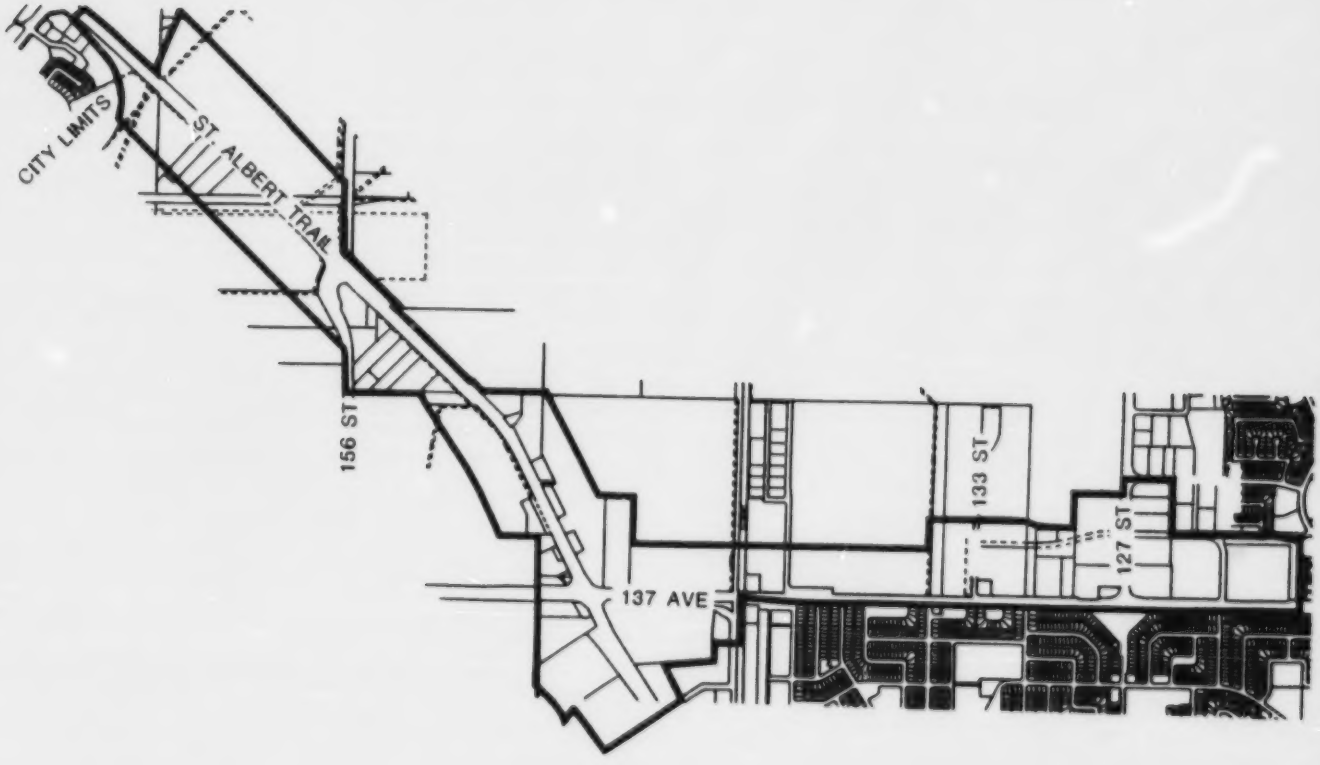
NOVEMBER 1989

MAJOR COMMERCIAL CORRIDOR

137 AVENUE/ST. ALBERT TRAIL

Appendix I to Schedule 814 of Bylaw 5996 as amended by Bylaw 9292 and subsequent appropriate Bylaws

N



NOVEMBER 1989

MAJOR COMMERCIAL CORRIDOR

FORT ROAD/MANNING FREEWAY

Appendix IV to Schedule 814 of Bylaw 5996 as amended by Bylaw 9292 and subsequent appropriate Bylaws

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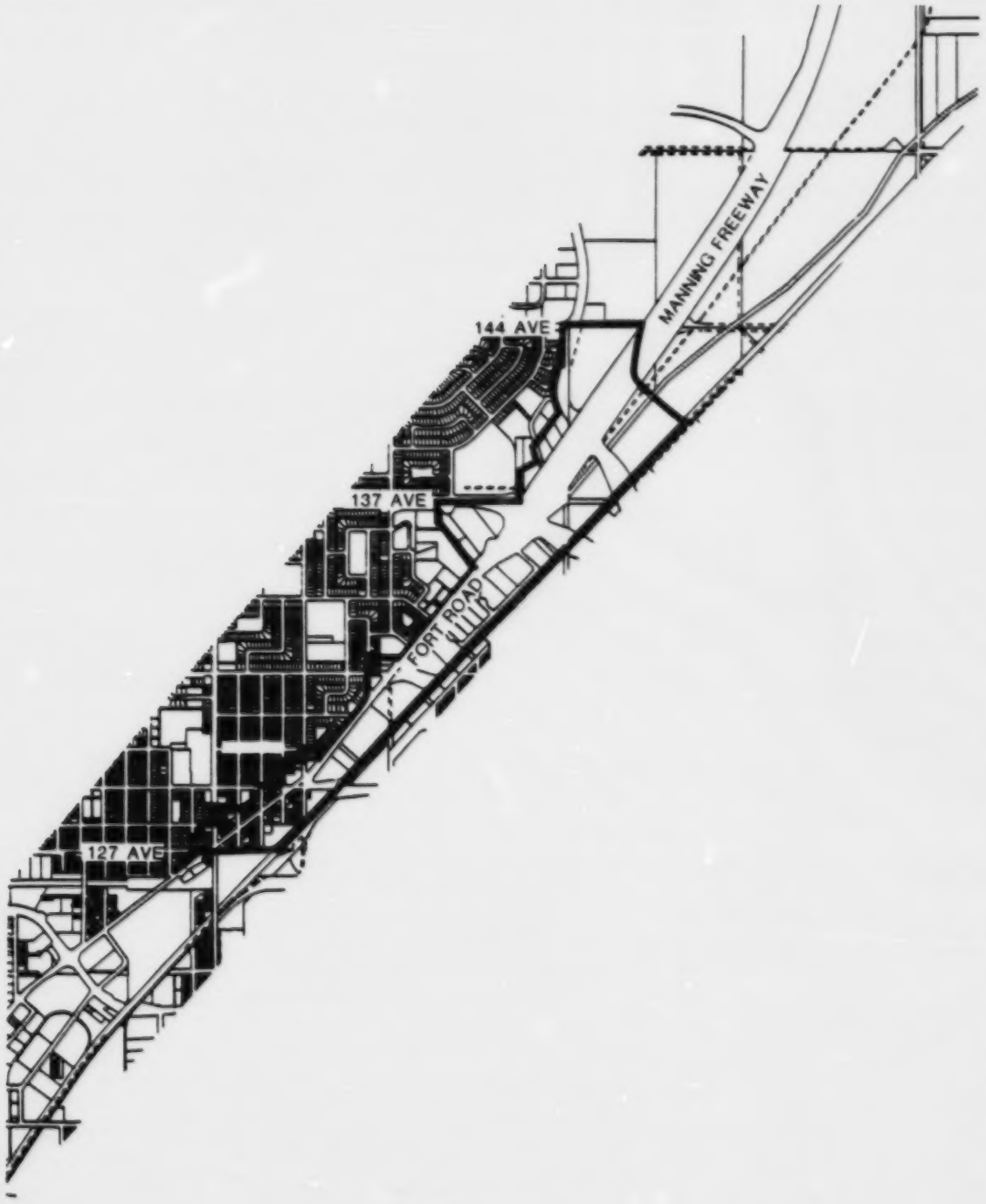
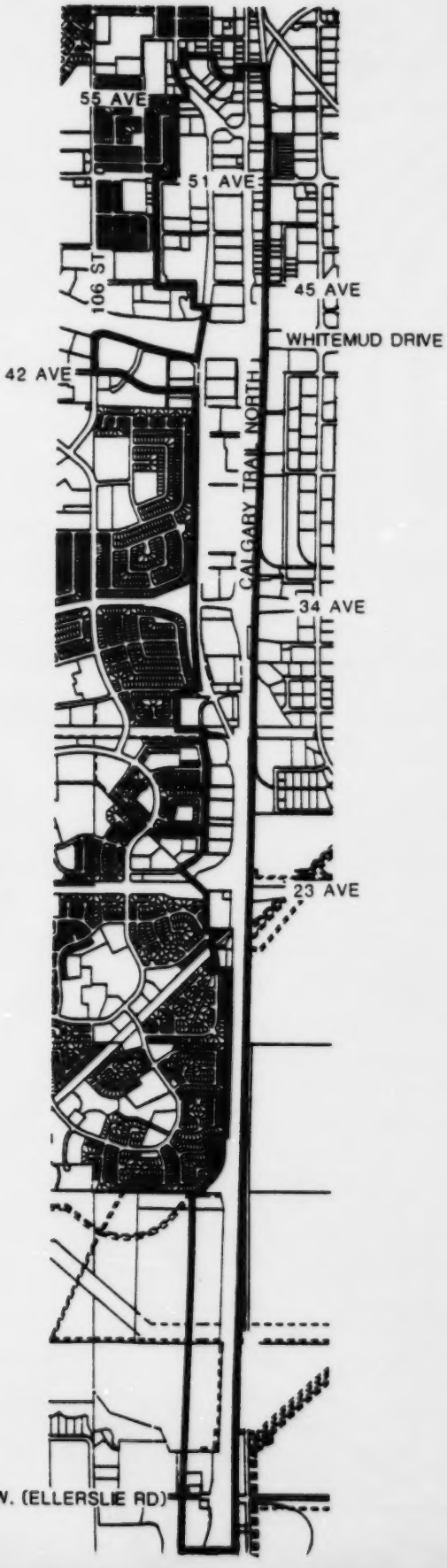


MAJOR COMMERCIAL CORRIDOR

CALGARY TRAIL

Appendix II to Schedule 814 of Bylaw 5996 as amended by Bylaw 9292 and subsequent appropriate Bylaws



NOVEMBER 1989

Appendix B

APPENDIX B

NOTE ON BUSINESS ASSESSMENT DATA

Data Source:

The report "Business Growth in Edmonton" is based on data from the business assessment data base, maintained by the Finance Department. Because the information is related specifically to the collection of business taxes, it has limitations in its application to other uses. Use of the business assessment data is discussed below.

Quarterly Data:

The Planning and Development Department received business assessment data on a quarterly basis since mid-1986. The data provides a means of tracking business change within the city, giving the number of business accounts added and the number of businesses deleted from the assessment records each quarter. A count of assessed businesses in the city is provided at the end of each quarter. This figure may be lower than data from other sources because subtenants are not always included. There are no business accounts for most Crown corporations and non-profit organizations. Also, many businesses in the home are not recorded.

Business Changes:

The figures for new and retiring businesses include changes within the city's business structure which do not involve the creation of a new business or the loss of a business. A new account may be created and the existing one closed if a business moves and continuity is not maintained because time elapses before the business reopens. A change in ownership will also result in a new assessment account but the business operation may remain the same.

The information on existing, new and retired businesses is complemented by floorspace data, but there is no record kept of vacant space.

Business Types:

The assessment data provides a profile of Edmonton's business structure by giving the number of businesses and the floorspace of each business type. The relative growth of each sector can therefore be monitored each quarter. A code is assigned to each business by the assessors to identify its type. These codes have been recategorized by the Planning and Development Department to make the business groups comparable with those used by Statistics Canada.

Location of Businesses:

Business data is available by assessment work area, which allows some locational analysis. However, the work areas do not correspond with other geographic units and they vary widely in size and characteristics, so that comparison between them is difficult. The report "Business Growth in Edmonton" contains a brief discussion on some of the major areas of interest in the city. More detailed information on changes in the business structure of specific areas is available from the Strategic Planning Branch.